



Ecommerce Doordrop Market Intelligence Report January to June 2022

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137m Doordrop Items Distributed In 2022

+63%
Ecommerce
Doordrop
Volumes in
2021

Doordrop
volumes by
Retail
increased
by 26million
(+72%)

80% of
Doordrop
Volume in
the Retail
and Food &
Drink
sectors

<u>Category</u>	<u>2022</u>			<u>New Doordrop Users</u>		
	<u>No. of Companies</u>	<u>Volume (Millions)</u>	<u>Year on Year %</u>	<u>No. of Companies</u>	<u>Volume (Millions)</u>	<u>% 2022 Volume</u>
Entertainment	19	9m	+60%	11	2m	23%
Food & Drink	44	47m	+34%	19	30m	63%
Retail	133	62m	+72%	66	10m	16%
Service	6	19m	+175%	4	870k	5%
Total	202	137m	63%	100	42m	31%

Doordrops Household Journey



Seen By
144m
People

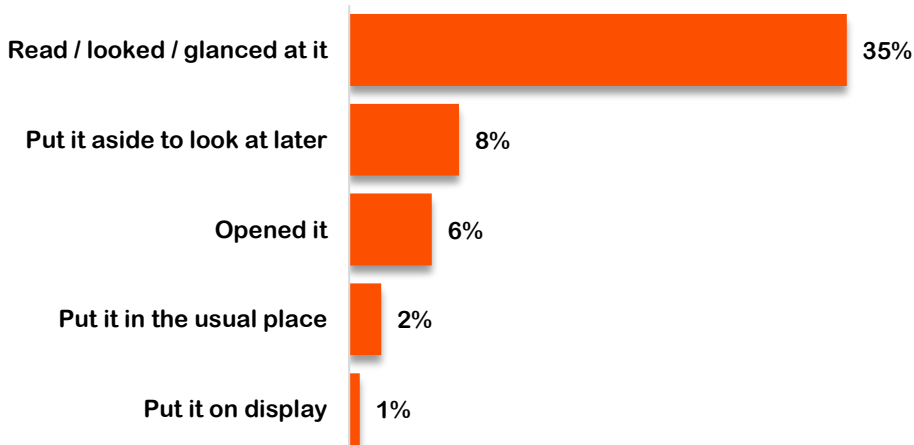
Ecommerce
Volume: 137m
Reach: 1.05
Frequency:
2.89



Read
415m
Times

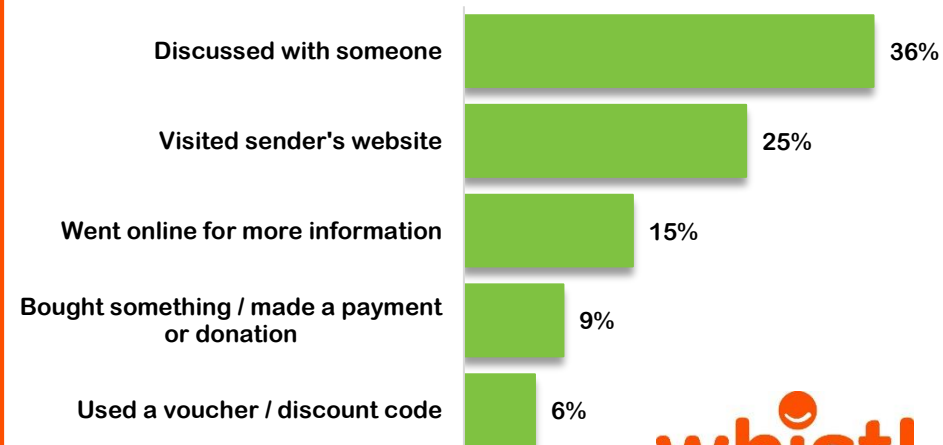
Physical Actions

Proportion of Physical Actions



12% Resulted in a Commercial Action

Proportion of Commercial Actions



Source: JICMail Jan - Jun 2022

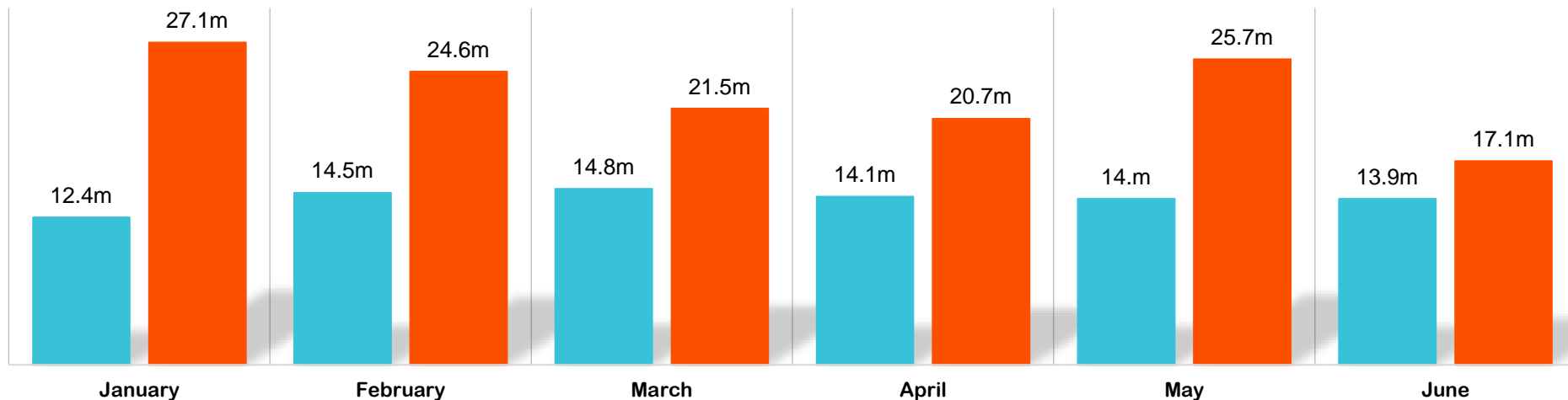
When was the Most Active Period During 2022

Ecommerce
Doordrop
Volumes by
Month

January &
February
were the
most
competitive
months

January had
the highest
Year On
Year change
+119%

■ H1 2021 ■ H1 2022

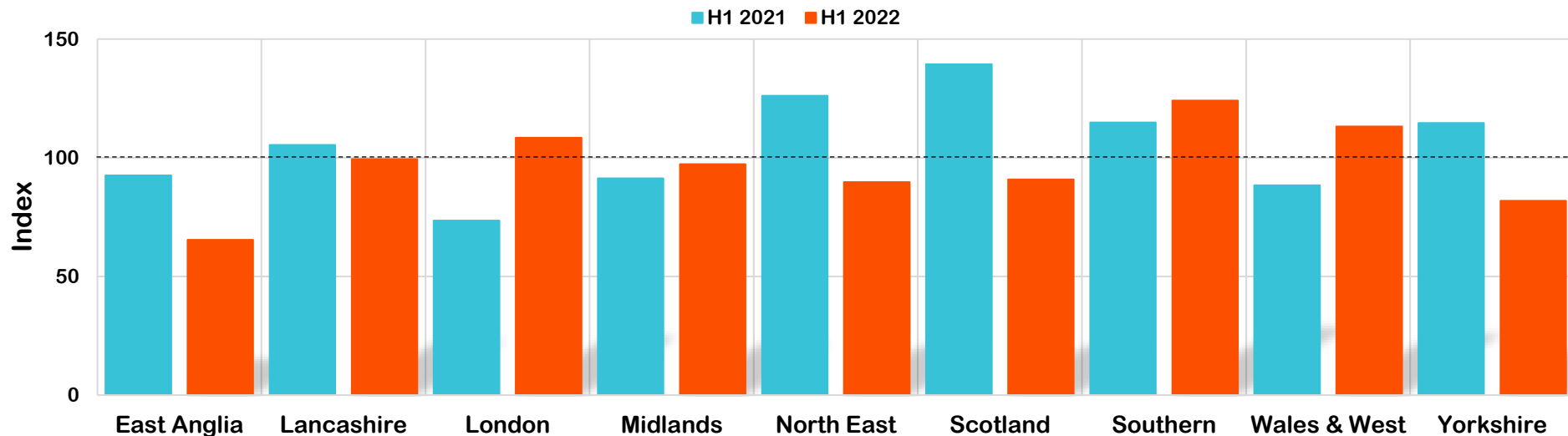


Where did Ecommerce Companies Reach Out To?

**H1 2022
Volume
Index by
BARB
Regions**

**BARB regions
which received
the most
Doordrops per
HH in H1 2022:
Southern
Wales & West
London**

**London
experienced
the greatest
growth in H1
2022
+163%**

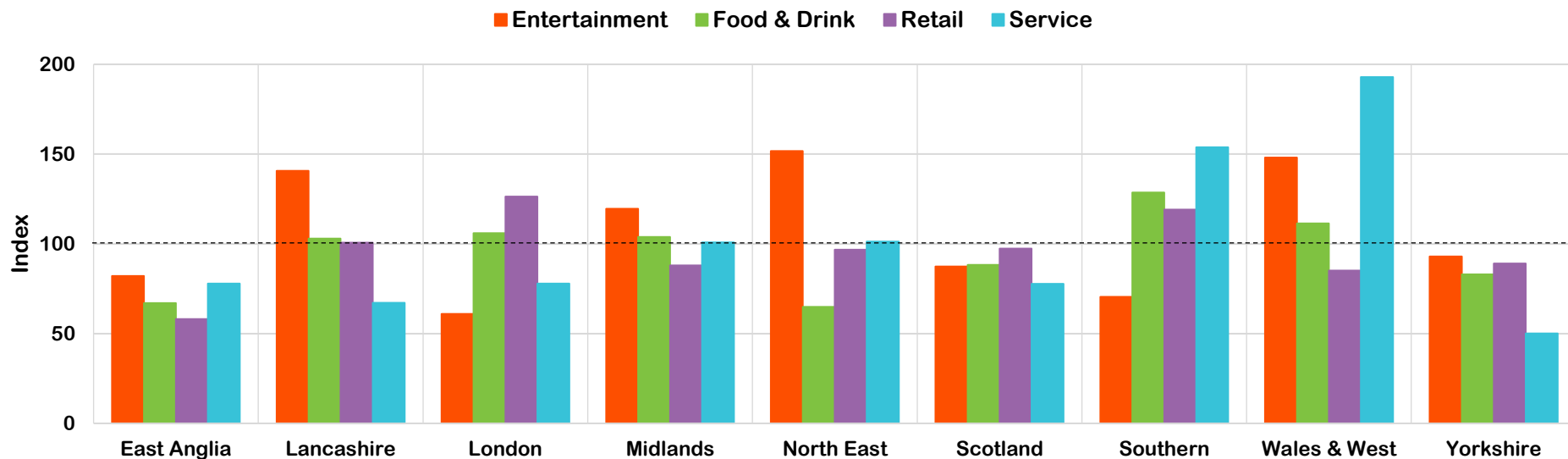


Where Ecommerce Companies Reached Out To In 2022

H1 2022
Volume
Index by
BARB
Regions &
Ecommerce
Sector

All BARB regions
received more
Retail related
Doordrop items
per HH than other
subcategories
*(in H1 2021 it was
Food & Drink)*

Ecommerce
Services
heavily targeted
Wales & West
with 22% of
Ecommerce
Services
Doordrops

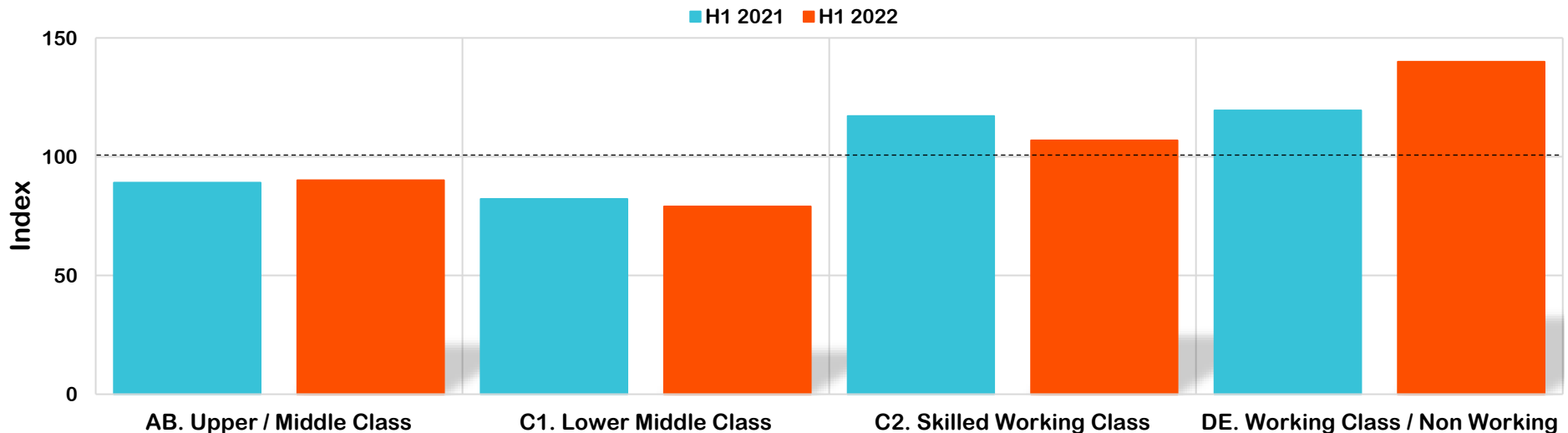


Who Are Ecommerce Companies Targeting?

**H1 2022
Volume
Index per
Household
by Social
Class**

DEs
experienced
the highest YOY
increase in
Doordrop items
**+19million
(+81%)**

DEs
consistently
receive the
most Doordrops
from
Ecommerce
Companies
(7.5 per HH)

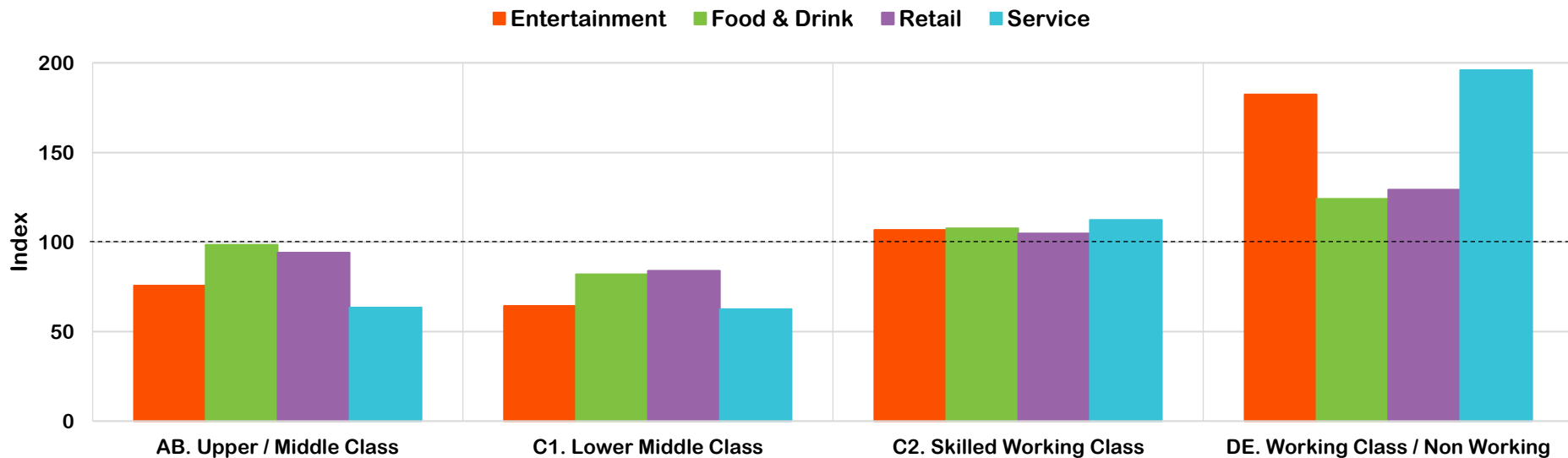


Who Are Ecommerce Sectors Targeting?

H1 2022
Volume
Index by
Social Class
&
Ecommerce
Sector

DEs were
the most
targeted
social class
across all
Ecommerce
sectors

DEs
received
8million
Services
Doordrops
in 2022
(41%)

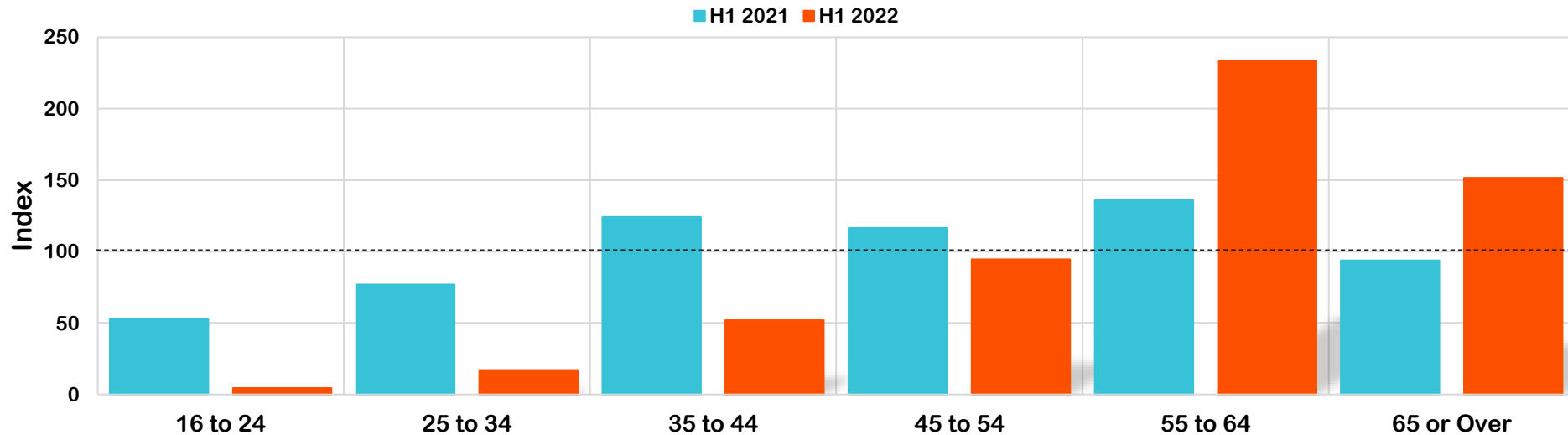


Who Are Ecommerce Companies Targeting?

H1 2022
Volume
Index by
Age
Group

Ecommerce
Companies
consistently
target the
over 45s the
most
(88%)

55-64 year
olds received
the most
Doordrops per
HH
(11.98 per HH)



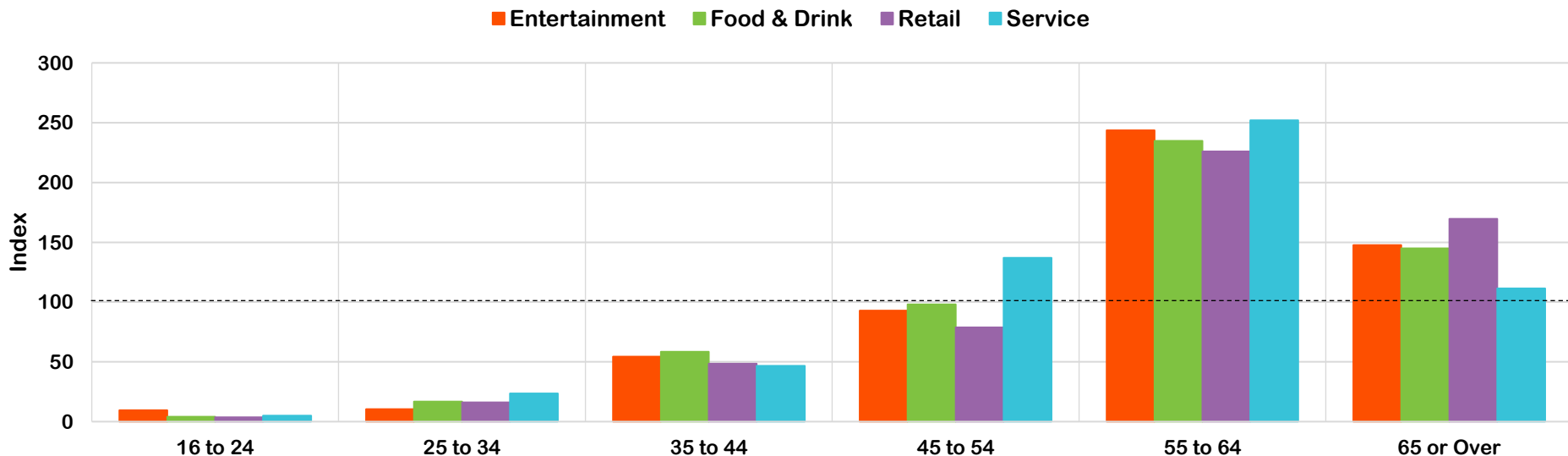
Source: Ebiquity Jan – Dec 2022

Who Are Ecommerce Sectors Targeting?

**H1 2022
Volume by
Age Group &
Ecommerce
Sector**



**66% of
Service
Doordrops
target
55+years old**

**All
Ecommerce
sectors
consistently
target the
55-64 age
bracket**






The Top 5 Ecommerce Companies in 2022

Most Doordrop Volume in 2022

Company:					
2022 Volume:	10 - 15m	10 - 15m	10 - 15m	10 - 15m	8 - 10m
Vs. 2021:	New User	New User	(+93%)	(+89%)	(+66%)
Category:	Food & Drink	Food & Drink	Food & Drink	Household	Household

Biggest Growth in Doordrop Volume in 2022

Company :					
2022 Volume:	10 - 15m	10 - 15m	8 - 10m	6 - 8m	10 - 12m
Vs. 2021:	New User	New User	(+430%)	(+567%)	(+93%)
Category:	Food & Drink	Food & Drink	Service	Retail	Retail

Ocado Creative: Example



Weight:
4g

Message:
“Let’s get one’s party started.”

Incentives:
£20 off 1st shop & free delivery

Response Type:
Online or App Sign-Ups

Market:
Ecommerce: Online

Month:
April 2022



Ocado Creative: Analysis



The attention is initially drawn towards the food products and the offer and brand logo have a probability of around 40% being seen in the first 3 – 5 seconds.

The 2 straplines have a probability of around 60%.

The colours and contrast help to make this creative engaging however the offer could be more prominent.



Ocado Creative: Target Audience



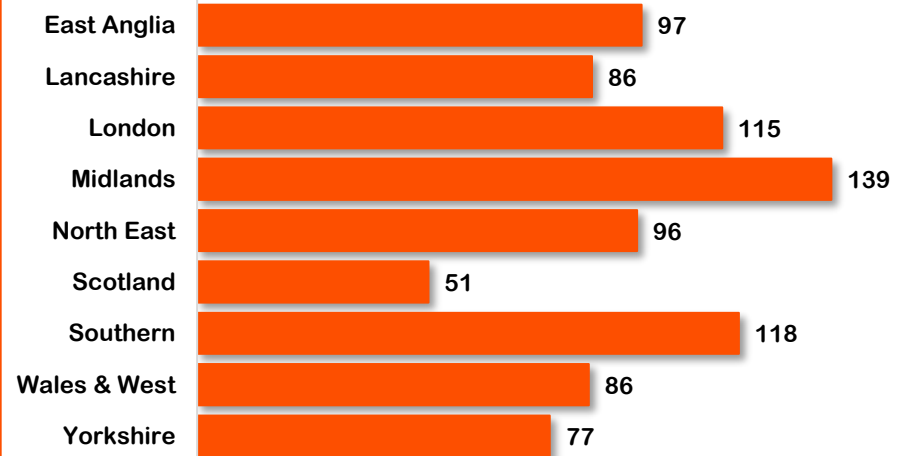
Targeting:

45+ years old
DE. Working Class / Non Working

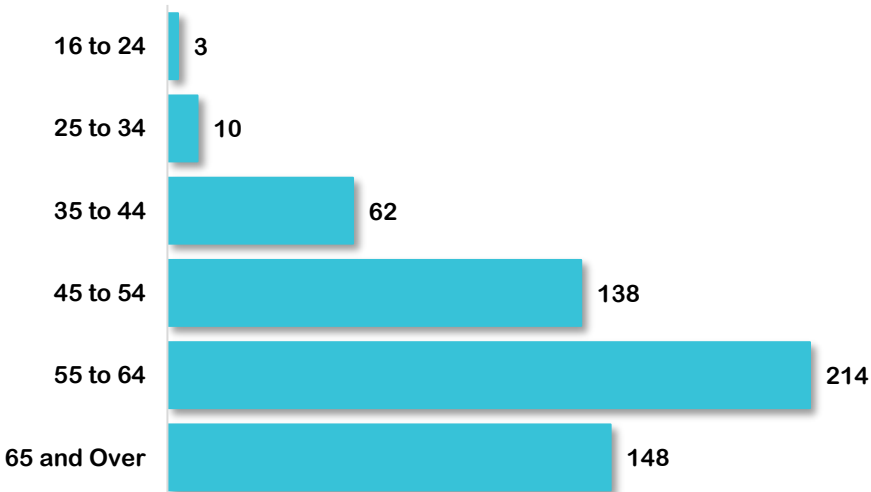
Geography:

Most likely Midlands, Southern & London

BARB Regions



Age Group



Source: Ebiquity

Social Class



Ocado: Target Audience Response



Read On Average:
3.03 times

Remained In The Home For:
Up To 26 Days

Number Of Commercial
Actions Per Item:
More Than 1 In 7 Items
(15%)

Ecommerce Industry

Read On Average:
2.85 times

Remained In The Home For:
Up To 26 Days

Number Of Commercial
Actions Per Item:
More Than 1 In 10 Items
(11%)

What Is Deemed As A Commercial Action:
Bought Something
Discussed With Someone
Visited Senders Website
Went Online For More Information
Called The Sender
Posted A Reply To The Sender

Bother Success Story

Client: Bother
Category: Home Delivery
Format: 2pp Leaflet



“We have learned how important Doordrops are as part of the marketing mix. This campaign drove far more organic visits than previous SEO campaigns. Our traffic spikes every time we do a drop. It is undeniably an effective way of getting attention compared to the usual means of acquisition”

Ryan Fuller, Head of Growth, Bother



Campaign Objective

- Home Delivery start up Bother had launched on social media & digital, achieving initial growth through Facebook, Instagram and Google.
- They needed to diversify into other channels to meet their ambitious growth targets.



Solution

- Working with Marketreach, a test & learn strategy was developed with a vision to roll out nationwide if successful. Doordrops were recommended as a saleable, targeted, and cost-effective channel to broadcast awareness and drive response.
- Bother's active customer base was profiled against geo-demographics to understand which were most predictive. The data was overlaid with Mosaic profiles and customer penetration to build a customer propensity model that was refined further using regional analysis.
- The first doordrop, sent to 2million households has a £25 off your first shop and used a QR code to make downloading the app quick & easy. It was a success!
- The targeting model was then rebuilt using insights from the response to the first campaign, as well as sector density analysis and further regional analysis. The doordrop creative was optimised using eye tracking technology and tested against the original split test.



Campaign Results

- In Bother's first campaign, App downloads increased by 1132% compared to the week prior. Each successive doordrop has delivered at least a 500% increase in app users.
- The Doordrops helped increase the efficiency of Facebook ads, lowering the channel CPA by 50% compared to the prior month. Even with this increase in efficiency, Doordrops were still able to outperform digital channels with CPA's 33% lower. Doordrop is now a core acquisition channel within Bother's marketing plan, with the brand looking to increase volumes in 2022 and explore how other mail products can deliver growth.



Data Sources

Ebiquity



- Ebiquity captures, organises and analyses advertising communications from the UK.
 - Providing clients with the visibility they require to react to competitor activity.
 - Giving clients greater confidence to develop successful communication strategies.
- Used by advertisers, agencies and media owners to understand who, where, what, and how much is spent on advertising.
- All volumes are based upon a robust panel size demographically weighted & nationally representative & then up weighted to represent a national booking.
- Although some numbers may not be 100% accurate, figures have not been updated with actual known numbers to provide a consistent approach and overall comparable picture against all advertisers.

JICMAIL - A Media Currency For Mail & Doordrops



Founded By



- JICMAIL helps media planners understand the power of these channels using exactly the same measurement standards as other media channels.
- JICMAIL is a joint industry initiative supported by the IPA and ISBA that measures readership reach and frequency of exposure to those tangible print items delivered to the home.
- The data from the JICMAIL panel informs us that 68% of all Doordrops are read or looked at and average frequency of 2.94 times, with a lifespan of up to 28 days.



Experian: Mosaic 7



- Experian Mosaic 7 provides in-depth understanding across all UK households.
- Accurate reflection of the UK consumer by demographic, lifestyle, behaviour.
- Providing rich and details consumer insight to build efficient campaigns.
- Key Factors Include:
 - Age Band
 - Household Income
 - Property Type
 - Education
 - Family
 - Adoption to technology

Kantar Media: TGI Survey



- Drawing on an annual sample of 24,000 adults, the survey is updated four times a year.
- Questions on spending behaviours, attitudes & methods to shopping, e.g.:
 - I couldn't live without the internet on my mobile phone
 - Shopping Online makes my Life Easier
- Key lifestyles and attitudes, including:
 - Financial
 - Spending Habits
 - Hobbies and leisure activities

Thank you



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